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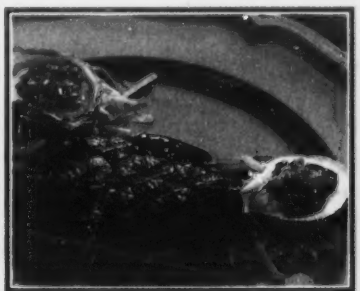
R&I CONSUMER SURVEY PICKS

AMERICA'S FAVORITE CHAINS

The Olive Garden, Mrs. Fields, Subway Lead New Winners

◀TOPS IN THE◀ PIZZA SEGMENT



BEEF AMERICAN STYLE

More Inside! See Page 4

PUBLICATI

FEB. 7, 1990

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R&I and market research firm NPD Group surveyed nearly 5,000 households to find America's favorite restaurant chains. The heart of the survey is each chain's satisfaction index—how well it is liked and for what reasons. A profile of the chains in each of 12 categories is included in our annual analysis of what makes a winner.

101 SPRING INTO FRUITFUL BEVERAGE PROMOS

March all over your competition by planning in February beverage promotions ready to launch in April and May. The time will then be ripe to reap profits using fresh fruit in colorful, flavorful mixed drinks.

115 PUTTING COMPUTERS TO WORK AS MANAGERS

Computers speed up the employee scheduling process, keeping managers on the floor, not in the office. Some programs also allow operators to maintain accurate reports on sales volume tied to productivity.

124 ROUNDING UP BEEFIER REGIONAL FOODS

Beef is back on menus in a big way. The public wants toothsome beef steaks and savory regional recipes that use beef as a prime ingredient. Recipes include Smoked Beef Tenderloin with Peppercorn Sauce, and Natchitoches Meat Pies.

139 MERCHANDISING ITALIAN-STYLE

Italian accompaniments make menus sparkle. Bring a renaissance of flavor, color and texture to your menu with the antipasto course, for instance; the classic appetizer becomes a tantalizing table of tastes when presented as an Italian-inspired salad bar. Soups and other side dishes also are featured.

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MARKET TRENDS

■ DATA DIGEST

'Help Wanted' Signs Likely to Stay Up in '90s, Figures Show

A new book published by American Demographics Press confirms what most fast-food chain executives already know: There is a dearth of teenage workers and the situation is not likely to improve within this decade.

The 1990-1991 Almanac of Consumer Markets, by Margaret K. Ambry, contains a wealth of statistics relating to the labor market, including the fact that nearly half of 16- and 17-year-olds already are in the work force and 26% of them are employed in foodservice operations.

Foodservice operators looking for full-time, entry-level employees are likely to have just as difficult a time as those who are recruiting teens. The two primary age groups they would draw from, 18- to 24-year-olds and 25-to 34-year-olds, both are expected to show decreases in population. The younger group will drop 3% by the end of the decade, while the older group will fall even more sharply, by 15%.

Some good news for the industry can be gleaned from the almanac, however, as a potential new labor pool might be emerging. The two age groups that will show the biggest population growth, ages 45 to 54 (up a whopping 47%) and ages 35 to 44 (up 18%), will also show an increase in labor-force participation by women as the baby-boomer women return to work. More than 84% of women 35 to 44 are expected to be working by 2000, compared to only 76.9% in 1990. Of the 45- to 54-year-old women, the participation rate will rise from 69% in 1990 to 75.4% in 2000.

Public Schools Still Under Fire

The foodservice industry not only faces a shortage of workers in the coming decade, but the skills of those workers might be below par, as the American education system continues to come under fire. A recent poll by The Roper Organization shows that more than half of the American public rates the quality of education at public schools as only fair or poor.

In addition, nearly half of the respondents gave their own community schools a grade of "C." Sixty-one percent said their local schools should pay more attention to teaching the basic skills such as reading, writing and arithmetic, and 57% said parents should pay more attention to what their children are learning and how they are doing in school.

Roper's newsletter, "The Public Pulse," suggests several initiatives corporations can take to help improve the U.S. school system, including: "adopting" a public school, donating equipment, giving employees time off to teach in the schools and sponsoring technical training courses.

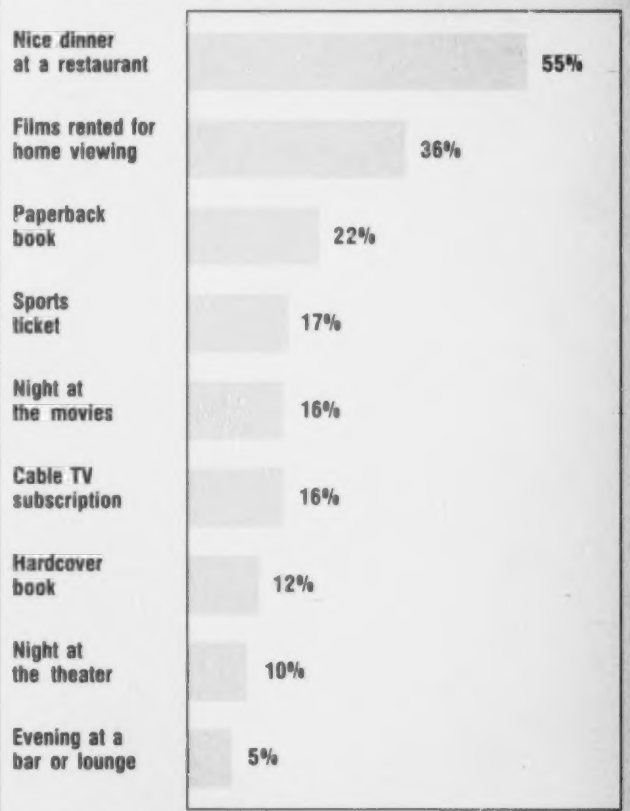
In Brief . . .

Lunch remains the meal most frequently eaten away from home, according to *R&I* research. Figures compiled at the end of 1989 show that 150.4 million lunches are eaten out each day, with fast-food operations getting the largest chunk of the business (42.7 million meals). Schools (26.2 million) and employee cafeterias (25.9 million) account for the majority of lunches on the institutional side. . . . The National Cattlemen's Association says the demand for beef is stabilizing after declining for years, in part because the industry has responded to consumer tastes by coming up with leaner cuts. Per-capita consumption is expected to be 67.8 pounds this year, down slightly from 68.6 pounds in 1989. . . . The Lempert Report newsletter reports that food scientists have developed a process whereby they can make cheese out of peanuts rather than milk, with the imitation cheese spread providing a more economical source of protein.

—Maureen Pratscher

DINNER OUT RATES AS BEST BUY

Good news for restaurateurs: In a recent *Wall Street Journal* poll, dinner out was rated the best entertainment value for the money. (Respondents could make up to three choices.)



Source: *The Wall Street Journal* Centennial Survey

R&I EXCLUSIVE

NATIONAL WINNERS

Burgers
WENDY'S INTERNATIONAL

Sandwiches
SUBWAY

Pizza
PIZZA HUT

Mexican
CHI-CHI'S

Dinner Houses
THE OLIVE GARDEN

Seafood
RED LOBSTER

Family Dining
BOB EVANS

Cafeterias
LUBY'S

Chicken
CHICK-FIL-A

Steak
STUART ANDERSON'S

Sweets
MRS. FIELDS

REGIONAL WINNERS

Central
BILL KNAPP'S

South
RYAN'S FAMILY STEAK HOUSE

East
HÄAGEN-DAZS

West
MARIE CALLENDER PIE SHOPS

The Olive Garden wins praise as the people's choice among dinner-house chains.

■ CUSTOMER SURVEY

AMERICA'S CHOICE IN CHAINS

R&I salutes the people's choice in national and regional chain restaurants.

By Lisa Bertagnoli and Brian Quinton

The foodservice industry thrives on measurements, from table turns to teaspoons of mustard in a rémoulade. But the most important measurement in the business—how well the operation fulfills the expectations of its patrons—is also the most difficult to gauge. For the 10th year, *Restaurants & Institutions* has applied a yardstick to that elusive property, customer satisfaction, by asking the public to vote for its favorite chain restaurants. This latest crop of winners features perennial segment leaders such as Wendy's, Red Lobster, Pizza Hut and Stuart Anderson's, companies that obviously know the secret of building a loyal following. But the list also includes two chains that hovered in and around the top spot for several years with regularity; for both Bob Evans and Chick-fil-A, steady attention to detail has put them out ahead of this year's competition. First-time winners The Olive Garden, Subway and Mrs. Fields prove that chains can expand quickly without sacrificing atmosphere and food quality, two important patron-pleasing attributes. One addition to this year's survey is not so much a category as a parallel ranking recognizing the achievements of regional chains whose patronage is largely confined to one-quarter of the country. Häagen-Dazs, Ryan's Family Steak Houses, Bill Knapp's Michigan and Marie Callender Pie Shops might not cover the same ground that their national or multi-regional competitors do, but the results of the survey prove that they can go the distance when it comes to giving customers what they like.

For an explanation of demographic groups and other methodology of the Choice in Chains survey, turn to last page of story.

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CHOICE IN CHAINS

BURGERS

This year, Choice in Chains respondents let good taste pick their favorite burger spots: Patrons say food quality is the strongest attribute at four out of the six chains profiled, while last year, good value dominated all other attributes in the burger segment. Some things never change, however. Burger restaurants remain an outpost for families and favorite eating places for consumers whose children help make eating-out decisions.

continued from page 39

1. WENDY'S

Satisfaction index: 2.34
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: South

Wendy's, once again the top burger chain, scores among the top 10 fast-food chains for atmosphere, food quality and cleanliness. The Dublin, Ohio-based chain of 3,660 outlets does well with singles as well as families. Consumers whose kids control eating-out decisions are faithful Wendy's patrons. The South is by far the chain's strongest region.

2. WHATABURGER

Satisfaction index: 2.32
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: South

At second place for the second year in a row is Whataburger, a chain of 415 units based in Corpus Christi, Texas. Favored by seniors as well as empty nesters, Whataburger also earns good marks for price/value. The senior diners must have grandchildren, however, because patrons with kids who control eating-out decisions are among the chain's best customers.

3. BURGER KING

Satisfaction index: 2.26
Strongest . . .
Attribute: Good value
Customers: Traditional families
Spending level: Heavy
Region: East

Miami-based Burger King has widespread appeal: The chain is popular among upscale sophisticates, time-strapped parents and kid-oriented households. Singles follow traditional families as Burger King's best customers. New Burger King owner Grand Met's work might be paying off: Patrons give the 5,500-unit chain high marks for cleanliness.

4. HARDEE'S

Satisfaction index: 2.25
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Medium
Region: Central

Hardee's salad selection and extensive chicken menu do not go unnoticed: Almost half the respondents who patronize the Rocky Mount, N.C.-based chain depict themselves as health- and diet-conscious. The 3,100-unit chain does well among empty nesters as well as families. Good value and cleanliness score close behind food quality.

5. CARL'S JR.

Satisfaction index: 2.25
Strongest . . .
Attribute: Food quality
Customers: Singles
Spending level: Heavy
Region: West

Anaheim, Calif.-based Carl's Jr. counts two groups—upscale sophisticates and consumers who sensibly balance time, diet and taste concerns—among its loyal customers. Traditional families follow singles as Carl's strongest demographic group. The 477-unit chain earns good marks for cleanliness and service as well as food quality.

6. SONIC DRIVE-INS

Satisfaction index: 2.25
Strongest . . .
Attribute: Good value
Customers: Traditional families
Spending level: Medium
Region: South

Sonic solidly fits the classic fast-food niche: Families are far and away the Oklahoma City-based chain's best customers (singles are a distant second), and Sonic is a favorite among those families whose children strongly influence eating-out decisions. The 980-unit chain also receives good marks for food quality and service.

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CHOICE IN CHAINS

SANDWICH

Long on taste and short on looks—that's how survey respondents see this year's group of sandwich chains. These five receive top honors for food quality, but only one, Rax, scores above average for atmosphere. And look who's doing the rating—a veritable slice of America, ranging from singles to empty nesters. All in all, the sandwich competition was close this year, with only hundredths of points separating winner Subway from second-place Arby's and third-place Rax. A slightly higher food-quality rating gives Subway the edge.

continued from page 44

1. SUBWAY

Satisfaction index: 2.36
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: South

This year's new sandwich-segment winner, Milford, Conn.-based Subway, leaps over three to unseat Rax as America's favorite sandwich chain. The 4,000-unit subshop earns praise for good value, service and cleanliness—only atmosphere scores fall below average. Subway's best customers are time jugglers, whose time constraints guide dining-out habits.

2. ARBY'S

Satisfaction index: 2.34
Strongest . . .
Attribute: Food quality
Customers: Singles
Spending level: Heavy
Region: Central

Atlanta-based Arby's noses out A&W and moves into second place this year. The 2,049-unit chain has a heavy following in the South as well as Central regions, and counts traditional families among its best customers. Time jugglers and the health-conscious (enticed by lots of salads and grilled chicken sandwiches) are also fond of Arby's.

3. RAX

Satisfaction index: 2.32
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: Central

Columbus, Ohio-based Rax is the only sandwich company to garner an above-average rating for atmosphere. The 521-unit chain pleases seniors and singles as well as empty nesters, and has a loyal following with the health-conscious and with families whose children help decide where to eat. The East is Rax's second-strongest territory.

4. A&W

Satisfaction index: 2.29
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: Central

A&W, Livonia, Mich., does well among kids-in-control families (could it be the famous root beer?) and sensible consumers, who balance the need for quick service with taste and diet concerns. Customers praise the 530-unit chain for good value and service as well as food quality. A&W finds loyal patrons in the West as well as Central region.

5. ROY ROGERS

Satisfaction index: 2.19
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: East

Roy Rogers is most popular among patrons who feel they are sensible diners-out, and also does well with health-conscious and sophisticated consumers, too. The East is home to 42.1% of the respondents who visit Roy Rogers. The Washington, D.C.-based chain of 607 restaurants recently was put up for sale by owner Marriott Corp.

Rax gets good marks for food quality.

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CHOICE IN CHAINS

PIZZA

For the sixth year in a row, Pizza Hut takes the honors for overall customer satisfaction in the pizza category. Its appeal seems to be both wide and deep, cutting across all demographic segments in the survey. Meanwhile, despite discounting, meal deals, the spread of delivery and any market blur that might have occurred in the pizza segment, the second tier of national chains still courts customers with good value, food quality and service. As the Red Queen said, it takes all the running you can do just to stay in the same place.

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1. PIZZA HUT

Satisfaction index: 2.46
Strongest ...
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: South

Pizza Hut's appeal is consistently high through the spending levels, regions and demographic groups surveyed: Patronage for the 6,700-unit chain falls to less than 50% only among Westerners, light spenders and seniors. The Wichita, Kan.-based chain does particularly well with families that allow the children to select the restaurant.

2. LITTLE CAESAR

Satisfaction index: 2.33
Strongest ...
Attribute: Good value
Customers: Traditional families
Spending level: Medium
Region: Central

Little Caesar—birthplace of the two-for-one pizza deal—earns top score on the price/value scale, not only with traditional families but among singles and empty nesters. More customers voted the 2,000-unit chain a good value than any other chain in the survey. The Farmington Hills, Mich.-based takeout chain also is a hit with time jugglers.

3. GODFATHER'S

Satisfaction index: 2.33
Strongest ...
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: Central

The best thing, by far, about Omaha, Neb.-based Godfather's Pizza is its food quality, according to a solid majority of customers surveyed; cleanliness and atmosphere tied for second-best attribute of the 550-unit chain. Interestingly, the company that sells dessert pizzas draws heavily from the health-and-diet behavioral group.

4. DOMINO'S

Satisfaction index: 2.25
Strongest ...
Attribute: Service
Customers: Traditional families
Spending level: Heavy
Region: South

Domino's popularity shows a remarkable consistency from one region to another: A spread of less than five percentage points separates the areas of highest and lowest patronage for the Ann Arbor, Mich.-based chain. Numerous college locations out of 5,000 total units mean that singles patronize the chain almost as much as families do.

5. PIZZA INN

Satisfaction index: 2.24
Strongest ...
Attribute: Food quality
Customers: Empty nesters
Spending level: Medium
Region: South

One explanation for St. Louis-based Pizza Inn's acceptance among medium spenders might be that the 670-outlet chain balances food quality, its top-rated attribute, with price/value. Perhaps because they also like Pizza Inn's value, the behavioral group most likely to patronize the chain are families where kids (or grandkids) are in control.

6. SHAKEY'S

Satisfaction index: 2.21
Strongest ...
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: West

Most of Shakey's customers are in the West; the Irving, Texas-based chain's second region of strength is the Central region. But the 400-unit chain earns its highest satisfaction rating where patronage is lowest—in the East. Patrons most commonly belong to the kids-in-control behavioral segment, but diet sophisticates also favor the chain.

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CHOICE IN CHAINS

DINNER HOUSE

Today's dinner-house customers are not singles, as they were in the fern-bar '80s, but a new generation of diners. Empty nesters—single-income households with no kids under 18 at home—are the most frequent patrons of five of the six chains profiled here. Their eating habits vary—some are concerned about health and nutrition while others must let time constraints dictate restaurant choices. But most dinner-house patrons consider themselves sophisticated in matters of taste and, accordingly, give high marks for food quality and atmosphere to their favorite chains.

continued from page 54

1. THE OLIVE GARDEN

Satisfaction index: 2.64
Strongest . . .
Attribute: Atmosphere
Customers: Empty nesters
Spending level: Heavy
Region: South

General Mills' Olive Garden makes its first Choice in Chains appearance at the top of the casual-dining category. The 200-unit chain, based in Orlando, Fla., gets highest marks for food quality (along with Benihana and Stuart Anderson's) among full-service restaurants. The Olive Garden is popular among patrons concerned about health and diet.

2. BENIHANA

Satisfaction index: 2.58
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: West

Miami-based Benihana garners the highest score and second-highest ratings for atmosphere and cleanliness among the full-service restaurants listed on the survey. The chain of 50 Oriental restaurants does well among singles and sensible consumers, who let taste, price and convenience dictate eating-out habits.

3. T.G.I. FRIDAY'S

Satisfaction index: 2.54
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: East

Dallas-based Friday's earns exceptional scores for atmosphere, placing in the top 10 full-service restaurants. The 136-unit chain is a favorite among sophisticates—upscale, urban and childless consumers—as well as time jugglers, whose schedules dictate dining patterns. Friday's also does well with seniors and in the Western region.

4. BENNIGAN'S

Satisfaction index: 2.54
Strongest . . .
Attribute: Atmosphere
Customers: Singles
Spending level: Heavy
Region: East

Bennigan's patronage is almost as strong in the South as in the East, and the Dallas-based chain is popular with empty nesters as well as singles. Among behavioral groups, 222-unit Bennigan's is popular with sensible consumers, who weigh taste, convenience and price when they make dining-out choices. The chain also gets good marks for food quality.

5. HOULIHAN'S

Satisfaction index: 2.53
Strongest . . .
Attribute: Atmosphere
Customers: Empty nesters
Spending level: Heavy
Region: East

Houlihan's, purchased last year by Riese Organization, New York, gathers praise for food quality as well as atmosphere. The chain's best customers are those concerned about health and diet as well as upscale, urban sophisticates. The East is by far the strongest region for 400-unit Houlihan's: The Central region places a distant second.

6. FUDDRUCKERS

Satisfaction index: 2.48
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: South

Wakefield, Mass.-based Fuddruckers places in the top 10 for food quality among the full-service chains that were listed on the survey. The 117-unit chain scores well in the West, with seniors, and with urban, upscale sophisticates. Fuddruckers is popular among teenagers, too: Nearly three-quarters of the teenagers who visit Fuddruckers like it a great deal.

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For information National Dairy Board circle 135 →

CHOICE IN CHAINS

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SEAFOOD

Burger chains, vying for health-conscious patrons with new chicken offerings, might want to look at their seafood competitors, whose menus attract exactly that type of consumer. And the seafood chains profiled here serve them especially well: Food quality and service are rated the highest attributes among the four. Seafood patrons continue to be older (always worried about diet or just getting started) and sophisticated (opting for broiled fish instead of fried, no doubt).

1. RED LOBSTER

Satisfaction index: 2.58
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: South

Red Lobster, based in Orlando, Fla., places among the top 10 full-service chains for cleanliness and food quality. The 512-unit chain brings out the seafood lover in empty nesters, upscale sophisticates, and health- and diet-conscious consumers. Red Lobster joins sister chain Olive Garden (both owned by General Mills) in placing first in a segment.

2. SKIPPER'S

Satisfaction index: 2.37
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: West

Bellevue, Wash.-based Skipper's wins applause from two behavorial groups: The sensible, everything-in-moderation set as well as the health-conscious. The 214-unit chain, recently purchased by Pizza Hut franchisee National Pizza, places in the top 10 among fast-food chains for food quality and service. Patrons also say the chain offers good value.

3. LONG JOHN SILVER'S

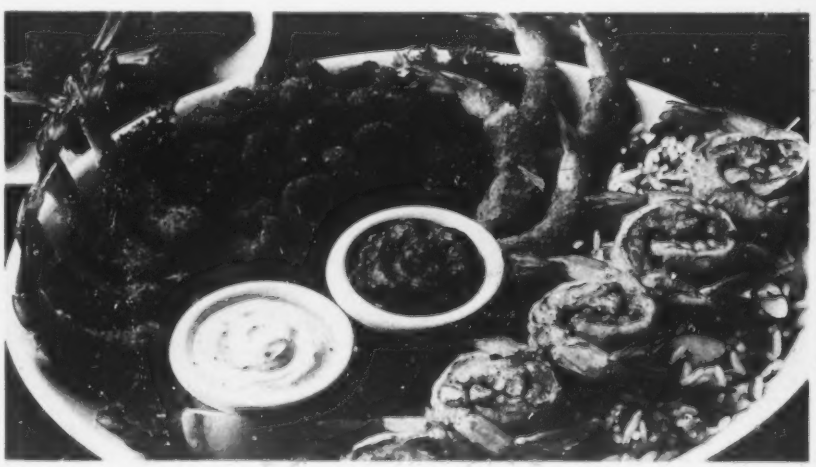
Satisfaction index: 2.35
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Medium
Region: Central

The health-conscious and time jugglers—who let convenience make eating-out decisions—are loyal customers of Lexington, Ky.-based Long John Silver's. The 1,478-outlet chain also earns high marks for cleanliness and service. Long John Silver's also does well in the South, and empty nesters rank after seniors as the chain's best customers.

4. CAPTAIN D'S

Satisfaction index: 2.30
Strongest . . .
Attribute: Good value
Customers: Seniors
Spending level: Heavy
Region: South

Nashville, Tenn.-based Captain D's receives equally high marks for food quality and good value, and service places a close second. The 588-unit chain, owned by Shoney's Inc., finds its best customers in sophisticated diners, the health-conscious and time jugglers. Empty nesters are also strong customers for Captain D's.



Red Lobster's seafood specials earn the chain high food-quality marks.

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CHOICE IN CHAINS

FAMILY DINING

Customers like this segment—a lot. The No. 1 family-dining chain scores among the top 10 on all five attributes; the second on four out of five. Overall excellence of product is the big draw here: Customers cite food quality as the best thing about five of the six chains on this page, and many of these chains fare well with the taste-seeking sophisticates. But service, value and nutrition are important, too: To compete in this segment, any concept has to be a decathlete.

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1. BOB EVANS

Satisfaction index: 2.56
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: Central

Columbus, Ohio-based Bob Evans scores in the top 10 for all attributes except atmosphere among all full-service restaurants included in the survey. The 230-unit chain appeals most to dining sophisticates, that group of customers who value flavor over price. Bob Evans also does well with time jugglers who let convenience dictate eating-out choices.

2. BAKERS SQUARE

Satisfaction index: 2.52
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: West

The 160-store restaurant also draws much of its business from singles. But the Denver-based chain's least frequent customers are families with kids in control of the dining choices. Bakers Square is slightly more popular with women than men: Just more than half its women patrons like the chain a great deal, compared to just under half for men.

3. SHONEY'S

Satisfaction index: 2.47
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

Value and service are the second-best things about this Nashville, Tenn.-based chain, say its patrons, who tend to be seniors and empty nesters. They're also part of the health-and-diet group, who advocate sensible eating. The 630-unit chain draws strongly from medium meal spenders as well. The Central region is another strong area for Shoney's.

4. PERKINS

Satisfaction index: 2.37
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Medium
Region: Central

This Memphis, Tenn.-based family-restaurant concept draws the sophisticate behavioral group, followed by variety-seeking time jugglers. After the quality of its food, service and atmosphere are 350-unit Perkins' most highly praised attributes. The chain's patronage is just a shade less strong in the Eastern region than in the Central region.

5. SWENSEN'S

Satisfaction index: 2.35
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: East

Food quality is important to the patrons of Phoenix-based Swensen's, but a clean environment comes next. A strong dessert menu at the 300-unit chain attracts sophisticates; sensible eaters like it almost as much. The chain does very well with teenage patrons between 15 and 17 years old, but, curiously enough, has less appeal to traditional families.

6. POFOLKS

Satisfaction index: 2.34
Strongest . . .
Attribute: Good value
Customers: Seniors
Spending level: Heavy
Region: South

Concerns about health and diet lead many calorie- and cholesterol-watching patrons to PoFolks' door. But taste is key, too: Food quality is the No. 2 attribute at Nashville, Tenn.-based PoFolks, and sophisticates rate the 150-outlet chain almost as highly as weight watchers. The chain's patronage is high in the Western region as well as in the South.

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CHOICE IN CHAINS

CAFETERIA

The rules of the cafeteria game are clear-cut. Food quality is the most important concern, followed by its price/value. Remaining energies should be concentrated on service and cleanliness, because atmosphere is least important to the base customer. The four chains on this page all rank remarkably close to one another in satisfaction, and they exhibit about the same attribute profile; but they all exert a subtly different appeal on their patrons—who might be seniors, but no longer are the stereotypical elderly.

continued from page 70

1. LUBY'S

Satisfaction index: 2.58
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

When the parts are right, the whole succeeds: Customers put San Antonio-based Luby's among the top five full-service chains in everything except atmosphere—and in the top 10 for that. Seniors are an important part of the customer base, but 120-unit Luby's also appeals to families where children are permitted to call the shots.

2. FURRS

Satisfaction index: 2.46
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

The menu flexibility of the cafeteria segment allows Lubbock, Texas-based Furrs to draw both heavy and light meal spenders almost equally. Both types of diners are likely to be sensible eaters, though the 160-unit chain also attracts the time-juggling behavioral group with its variety and high perceived price/value.

3. MORRISON'S

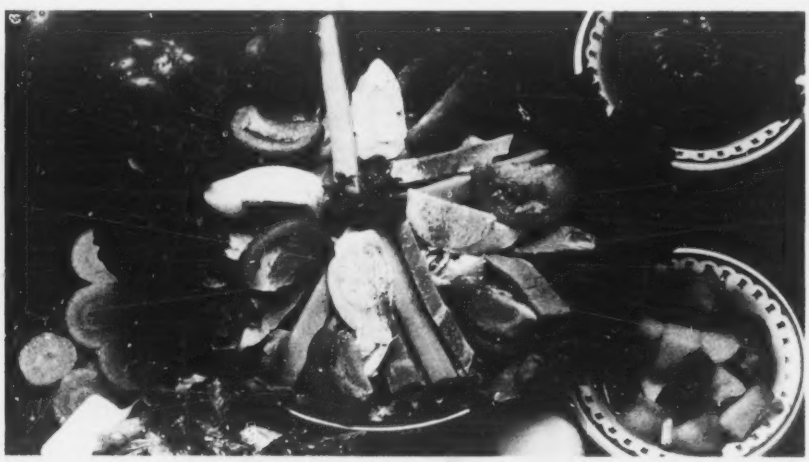
Satisfaction index: 2.43
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

Food quality comes first, leaving value and service to tie for second-most important attribute at Mobile, Ala.-based Morrison's. Cleanliness and atmosphere come next. Perhaps because seniors figure so large at the 180-unit chain, it draws heavily from the health-and-diet behavioral group; but young, time-juggling families like it, too.

4. PICCADILLY

Satisfaction index: 2.42
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

Between health-and-diet conscious customers and the sensible appetites, the majority of Piccadilly's patrons express an interest in monitoring their diets; but families with kids in control also give the Baton Rouge, La.-based chain some of their dining attention. Empty nesters also are good customers for the 140-unit chain.



Cafeterias garner high food-quality marks from seniors, their best customers.

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CHOICE IN CHAINS

CHICKEN

Good and good for you, say Choice in Chains respondents about America's fast-food chicken. All six companies get rave reviews for food quality, and that trait is patrons' favorite at five of the six chains profiled. And chicken appeals to several distinct groups, ranging from health-conscious consumers to families whose kids decide where to eat. Despite such wide appeal, regional food tastes remain strong. The South is the strongest region for all these chains, even for national Kentucky Fried Chicken.

continued from page 72

1. CHICK-FIL-A

Satisfaction index: 2.44
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Heavy
Region: South

Atlanta-based Chick-fil-A once again takes the top chicken spot after a year-long hiatus. The chain's Southern tradition is strong: 41.4% of survey respondents who patronize Chick-fil-A live in that region. The 390-unit chain, situated mainly in malls, appeals to time jugglers, who base eating-out decisions on convenience.

2. GRANDY'S

Satisfaction index: 2.42
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

The "grannies" who serve as hostesses in Grandy's 206 outlets certainly seem worth their salaries: the chain boasts one of the highest service ratings for fast-food restaurants. The Lewisville, Texas-based chain is a favorite among health-conscious consumers as well as sensible diners. Grandy's is part of the American Restaurant Group.

3. KENTUCKY FRIED CHICKEN

Satisfaction index: 2.33
Strongest . . .
Attribute: Food quality
Customers: Traditional families
Spending level: Medium
Region: South

Louisville, Ky.-based Kentucky Fried Chicken, owned by PepsiCo, also has strong patronage in the Central and West regions. The 7,761-unit chain does best with families whose children influence eating-out decisions, and with time jugglers who place a premium on convenience. KFC rates above-average scores in all categories except atmosphere.

4. POPEYES FAMOUS FRIED CHICKEN

Satisfaction index: 2.27
Strongest . . .
Attribute: Food quality
Customers: Singles
Spending level: Heavy
Region: South

Popeyes, based in Jefferson, La. also scores well for value, but earns below-average marks on service and atmosphere. Popular with health-conscious consumers, the 715-unit chain also rates highly with those who take a sensible approach to eating out. Women favor Popeyes: 40% of female patrons and 30% of male patrons like the chain a great deal.

5. BOJANGLES'

Satisfaction index: 2.25
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy
Region: South

Bojangles', Charlotte, N.C., receives praise for good value and service as well as food quality. Sophisticates, or customers who call themselves upscale in matters of taste and living, are Bojangles' best customers. The 61-restaurant chain also fares well among singles. Bojangles is owned by New York-based Horn & Hardart.

6. CHURCH'S

Satisfaction index: 2.12
Strongest . . .
Attribute: Good value
Customers: Singles
Spending level: Medium
Region: South

Church's, which is now owned by fourth-ranked Popeyes, also receives high marks for food quality and service. The San Antonio-based chain of 1,481 restaurants is a favorite with seniors. Convenience-seeking time jugglers are among Church's best customers. Almost 25% of the chain's patrons say its atmosphere needs improvement.

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CHOICE IN CHAINS

STEAK

Customer expectations differ greatly across this segment. At the top, diners like Stuart Anderson for food quality and atmosphere; value is the least important feature, though they still give its prices high marks. But at Bonanza, price/value perception is everything, and atmosphere matters much less. The chains still have plenty in common, of course. All tend to draw an older customer who spends heavily on eating out; and most have broadened their menus enough in the last few years to attract a customer who claims to be concerned about health.

continued from page 74

1. STUART ANDERSON'S

Satisfaction index: 2.69
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: West

Among all full-service restaurants, Los Altos, Calif.-based Stuart Anderson ties for first in food quality and ranks No. 1 in value and No. 3 in service, atmosphere and cleanliness. No wonder the 85-unit chain receives the highest satisfaction index of any national chain in the survey. Health-minded and sophisticated patrons are big Stuart Anderson's fans.

2. STEAK & ALE

Satisfaction index: 2.61
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: South

Keeping up the high competitive level in this segment, Dallas-based Steak & Ale places in the top five full-service chains of any kind on quality, service, atmosphere and cleanliness. A broad menu helps the 160-unit chain draw well from both sophisticates and the behavioral group concerned with health and diet.

3. GOLDEN CORRAL

Satisfaction index: 2.54
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Medium
Region: West

For a steakhouse chain, Golden Corral shows a surprising amount of strength among calorie-watching behavioral groups, and very consistent patronage numbers in the West, South and Central regions. Households with female heads opt for the Raleigh, N.C.-based chain of 500 restaurants more often than those headed by males.

4. SIZZLER

Satisfaction index: 2.52
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: West

Perhaps because they also offer salads and seafood, Sizzler's 650 restaurants appeal to the health- and diet-conscious patron; but taste-seeking sophisticates also favor the Los Angeles-based chain. Though many of its customers spend heavily on meals, Sizzler ranks seventh among the full-service chains included in the survey.

5. MR. STEAK

Satisfaction index: 2.42
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Heavy
Region: Central

After food quality, consumers like Littleton, Colo.-based Mr. Steak's cleanliness best. Customers come most often from the health-and-diet group, then from the ranks of sophisticates and sensible eaters. After seniors, empty nesters are the 125-unit chain's best customers. Mr. Steak also is popular in the Eastern region.

6. BONANZA

Satisfaction index: 2.40
Strongest . . .
Attribute: Good value
Customers: Empty nesters
Spending level: Medium
Region: Central

Because value is its strongest feature, Dallas-based Bonanza succeeds better with traditional families than most other steakhouse chains. Time jugglers who let kids, convenience and a range of food choices dictate dining habits also favor the 620-unit concept over others. Bonanza also has strong patronage in the South.

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CHOICE IN CHAINS

SWEETS

Why do Americans eat sweets? Because we like them! Respondents give highest marks to quality of food for all the sweets chains they patronize, and winner Mrs. Fields scores the highest among all fast-food chains listed on the survey. Apparently, sweets patrons don't mind paying for their indulgences: None of the chains show high marks for good value, and all but one attract heavy food-away-from-home spenders. This year's poll also indicates that sweet treats aren't just popular with kids, but with seniors, singles and—surprise—health-conscious consumers as well.

continued from page 76

1. MRS. FIELDS COOKIES

Satisfaction index: 2.60
Strongest . . .
Attribute: Quality of food
Customers: Traditional families
Spending level: Heavy
Region: West

Almost everybody likes Mrs. Fields cookies: The delectable disks garner the highest food-quality rating of any of the fast-food chains on the survey this year, with more men than women saying Mrs. Fields' food quality is above average. The 650-unit chain, based in Park City, Utah, also receives raves for cleanliness and service.

2. BASKIN-ROBBINS

Satisfaction index: 2.59
Strongest . . .
Attribute: Quality of food
Customers: Traditional families
Spending level: Heavy
Region: West

Glendale, Calif.-based Baskin-Robbins receives the third-highest score for cleanliness among the fast-food chains. The 3,386-unit chain also gets good marks for service, and scores well with singles as well as traditional families. Time jugglers—those concerned about convenience—are more likely to patronize Baskin-Robbins than other groups.

3. TCBY

Satisfaction index: 2.59
Strongest . . .
Attribute: Quality of food
Customers: Seniors
Spending level: Heavy
Region: South

Frozen yogurt is no longer a fad, but a way of life for the health-conscious: TCBY is most popular with this group. The Little Rock, Ark.-based chain is better-liked by women: 63% of female patrons like the chain a great deal, compared to 50% of male TCBY patrons. The 4,000-unit chain receives the highest service rating among fast-food chains.

4. T.J. CINNAMONS

Satisfaction index: 2.57
Strongest . . .
Attribute: Quality of food
Customers: Seniors
Spending level: Heavy
Region: East

T.J. Cinnamons, Kansas City, Mo., scores the second-highest (after Mrs. Fields) food-quality rating among fast food chains, and among the top 10 in atmosphere and cleanliness. Teenagers, too, like T.J. Cinnamons: More than half its teenage patrons like the chain a great deal. The company operates about 1,200 cinnamon-roll stores nationwide.

5. DUNKIN' DONUTS

Satisfaction index: 2.36
Strongest . . .
Attribute: Quality of food
Customers: Singles
Spending level: Heavy
Region: East

Randolph, Mass.-based Dunkin' Donuts scores highest with sophisticates—urban, upscale consumers. Patrons with sensible appetites, those who balance taste and health needs, run a close second. Traditional families follow singles as Dunkin' Donuts' best customers. The 1,767-unit chain scores above average for all attributes except atmosphere.

6. DAIRY QUEEN

Satisfaction index: 2.35
Strongest . . .
Attribute: Quality of food
Customers: Traditional families
Spending level: Medium
Region: Central

Kids reign at Dairy Queen: The ice-cream stores are most popular with families whose children dictate most eating-out choices. The Minneapolis-based chain of 5,122 outlets also scores well with heavy spenders and with patrons who live in the South. DQ receives only one below-average mark, and that for atmosphere.

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CHOICE IN CHAINS

REGIONAL WINNERS

Choice in Chains respondents' favorite restaurants are those in their own back yards. Bill Knapp's, winner in the Central region; Ryan's Family Steak Houses, top chain in the South; Eastern winner Häagen-Dazs Ice Cream; and Marie Callender's Pie Shops, the West's favorite, all measure up admirably against their national counterparts. Both Marie Callender's and Häagen-Dazs win higher food-quality scores than national winners Bob Evans and Mrs. Fields.

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BILL KNAPP'S **CENTRAL**

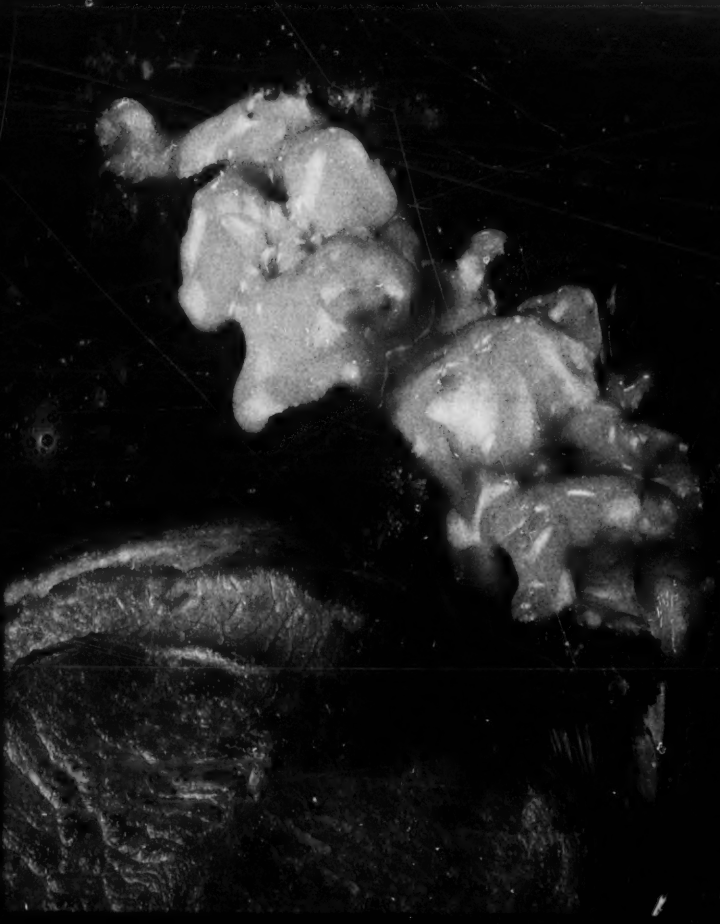
Satisfaction index: 2.53
Strongest . . .
Attribute: Food quality
Customers: Seniors
Spending level: Medium

Bill Knapp's country-style menu of sandwiches, salad and soup is popular with singles, too, although seniors make up more than half the chain's patronage. The Battle Creek, Mich.-based chain is popular with health-conscious consumers and with those who say they take a sensible approach to eating out, weighing both taste and diet factors. Bill Knapp's wins high praise from men: 56.9% of the chain's male patrons like the chain a great deal, compared to 41.4% of women customers. And although the 63-unit chain has several restaurants in Florida, all the Bill Knapp's patrons surveyed live in the Central region.

RYAN'S FAMILY STEAK HOUSES **SOUTH**

Satisfaction index: 2.63
Strongest . . .
Attribute: Good value
Customers: Empty nesters
Spending level: Heavy

In the steak-house category, Ryan's, based in Greenville, S.C., has a satisfaction index second only to Stuart Anderson's, the national winner. The 122-unit chain wins praise for food quality (Ryan's food costs run close to 40% of sales) and service (the restaurants feature self-serve food bars that complement steak, chicken and seafood entrees). Among behavorial groups, Ryan's is popular with families whose children strongly influence eating-out habits, and with "sensible" consumers who choose restaurants that meet both taste and nutrition requirements. Male and female patrons equally like the chain.



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HÄAGEN-DAZS **EAST**

Satisfaction index: 2.61
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy

Häagen-Dazs, the favorite in the East, is based in Teaneck, N.J., and finds its best customers among folks who consider themselves sophisticated diners-out. Health-and diet-conscious consumers also frequent the ice cream chain, most likely to try its new fruit and frozen-yogurt entrees. The 315-unit chain does well with traditional families as well as empty nesters. Pillsbury-owned Häagen-Dazs is much more popular with women than with men: 67.5% of its female patrons like the chain a great deal, versus 47.2% of the chain's male patrons. And two-thirds of teenage Häagen-Dazs customers like the chain a great deal.

MARIE CALLENDER'S PIE SHOPS **WEST**

Satisfaction index: 2.57
Strongest . . .
Attribute: Food quality
Customers: Empty nesters
Spending level: Heavy

Marie Callender's upscale menu of pies and sandwiches is most popular with patrons who call their eating-out habits sophisticated. The chain's wood and stained-glass decor, which has won several restaurant design awards, garners Marie Callender's a high score for atmosphere. Health- and diet-concerned patrons are also frequent patrons of the 152-unit coffee shop chain. Phoenix-based Marie Callender's has a loyal following among seniors as well as empty nesters. Nearly two-thirds of Marie Callender's patrons call themselves heavy spenders, with weekly dining-out budgets of more than $26.

Marie Callender's woos the West with good food and an elegant atmosphere.

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CHOICE IN CHAINS

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R&I's research method for Choice in Chains generates a profile of each chain's customers.

In compiling this year's *R&I* Choice in Chains ranking, the market research firm of NPD Group conducted a mail survey of 6,694 households equally distributed in the Northeast, North Central, South and West census regions. The questions for each region contained a list of 73 restaurant chains; a total of 105 chains were included in the survey. The final sample for the survey was 4,655 completed interviews, for a response rate of 70%.

As in past years, the heart of the survey is each chain's satisfaction index. To calculate this, researchers ask those who patronized a chain in the last year if they liked it, liked it a great deal, or disliked it. "Like" responses earn two points, and "liked a great deal" earn three; "dislike" answers are given one point. The point total is then divided by the number of patrons who express an opinion about the chain, resulting in a number between 1 and 3 that indicates how well a chain pleases its customers. The chain with the highest satisfaction index in a menu segment wins the segment. Where two concepts earn the same index, higher patronage decides the winner.

This year *R&I* adds two new categories to the 10 included in past surveys. One breaks out the cafeteria chains, ranking them by index the way burger or dinner-house chains are rated. The second innovation ranks all "regional" chains within a geographical area. These 30 chains have measurable patronage in only one region of the country; they span the menu, from steakhouses to sweets. Using the satisfaction index, *R&I* has selected four winners from this list, one in each region of the country.

After voting on the overall satisfaction provided by a given chain, recent patrons are asked to give separate ratings to its main attributes: food quality, value, service, atmosphere and cleanliness. In each case, the rating indicates whether a customer thinks the concept is above average, average, or needs improvement in that attribute.

The Choice in Chains survey also draws a profile of each chain's typical customers: their demographic characteristics, the weekly amount their households spend on food away from home, and the behavioral factors that influence their dining-out choices.

The survey identifies three general spending levels for food away from home. Heavy-spender households normally spend a total of $26 or more on food and beverages purchased from a fast-food or full-service restaurant. Medium-spender households spend $10 to $25 a week on eating out, while light-spender households purchase less than

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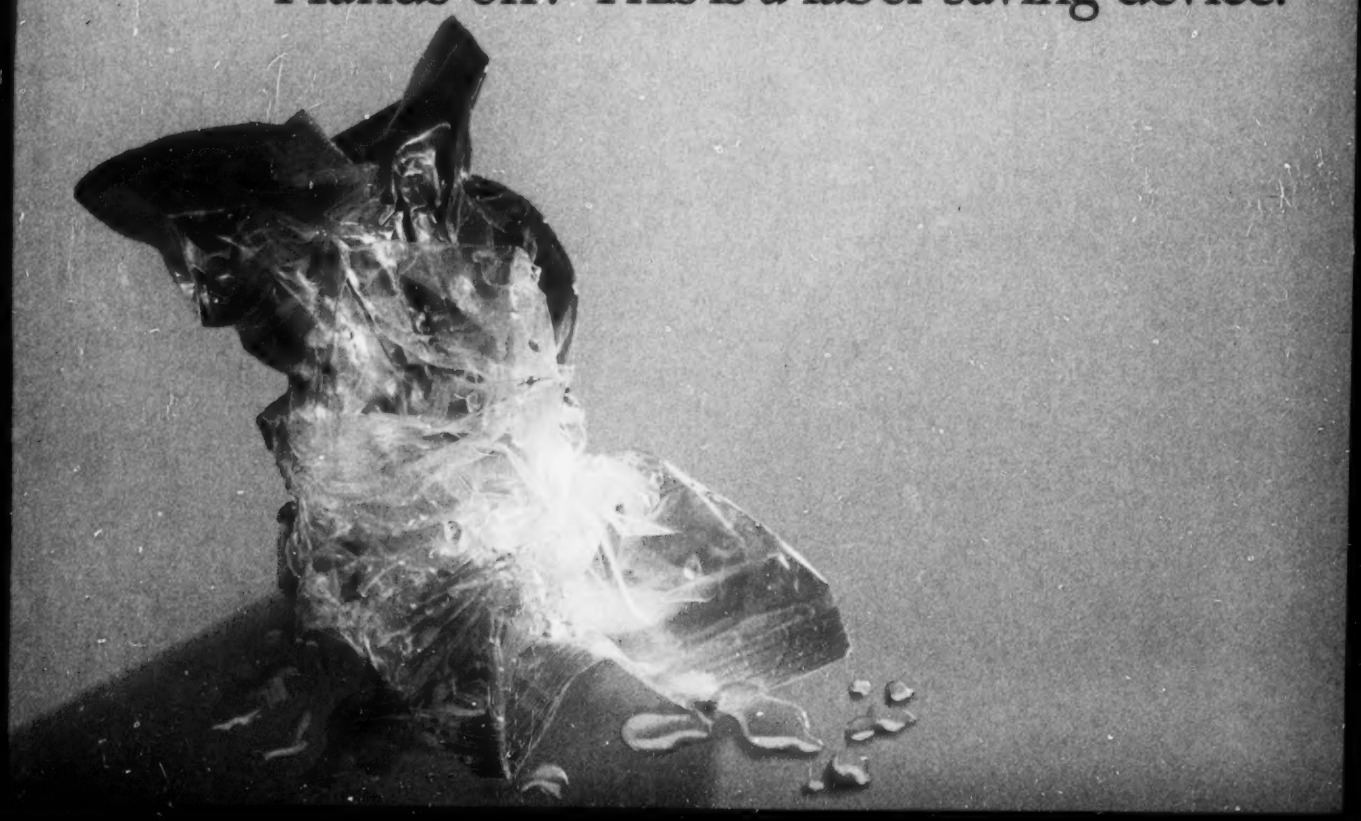

$10 worth of food away from home.

Survey subjects fall into four demographic categories. "Singles" are those unmarried customers under 65 years old, from any income level. For purposes of this survey, "traditional families" are those households with children under 18 living at home and only one spouse employed. "Empty nesters," on the other hand, have one income and no children under 18 living at home. And "seniors" are those households in which the female head is 65 years old or more.

Finally, in an effort to correlate customers' satisfaction with their overall eating habits, this year's survey classifies households by the foods and beverages they consume at home and away.

Eating preferences of "kids in control" families are strongly influenced by the children in the home. Their household diet features a lot of items kids enjoy—peanut butter, cookies, pizza, hot dogs and fast-food takeout items. They use microwaves and other appliances often, worry little about salt or cholesterol intake, and tend to consider price in making purchases.

"Time juggler" households often have very young children whose eating preferences must be balanced against those of older members. In fact, the group does not show strong preferences for any kind of food or drink except baby food. These families are often younger and larger than the "kids in control" group, but they are just as sensitive to price and are no more concerned with health or nutrition. Many of the eating decisions time jugglers make are made under time pressure; homemakers in this group are often employed full time. Their lesser preferences show the important influence children have on buying decisions: fruit bars, soft drinks, presweetened cereals, pizza, casseroles and combination entrees.

"Sophisticates" lead the typical upscale-urban-unencumbered life. They consider themselves culinary adventurers. When dining out—something they do often—these people tend to select new restaurants, foreign cuisines and dishes they have not tried before. When dining at home, they indulge very adult tastes for items like wines, veal, lamb, butter, sourdough and bran breads, and premium ice creams. They use the pressure cooker more often than other groups, and are less interested in the nutrition of their food than in its convenience.

On the other hand, "sensible appetites," look for both taste and good health. The tastes they look for come from hearty meat-and-potatoes fare such as pot roast, pot pies, gravies and breads; but they will sacrifice some of that taste to save a few calories.

"Health and diet" consumers are most interested in weight loss and nutrition. They strongly avoid fast-food takeout items and use microwaves more than most people, often preparing entire main meals with them. Homemakers in this group shy away from fried food, cholesterol and fat, and feel strongly that artificial sweeteners taste as good as sugar. R&I

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■ COLLEGES & UNIVERSITIES

Racial Tensions Create Rainbow of Problems

Focusing on the job helps ease racial problems in college foodservice.

At a large university on the East Coast, the number of students willing to work for the foodservice department has dwindled. Rather than being served by their peers, students are now served by outside workers, and that situation has created a number of problems, some of which definitely have racial overtones.

The student servers were of the same race—white—and came from a socio-economic background similar to that of most student customers. The new servers often are less educated, come from poorer families and, in this instance, often are black.

"In some cases, the new servers made it very clear that they resented the college kids," says the foodservice director, "and in some respects, you can understand their feelings. But that doesn't mean you can have the servers calling students 'snowballs'—which has happened.

"But there's another, at least equally significant, problem," continues the director. "The supervisors, who are responsible for the servers, had been accustomed to working with a generally much more enthusiastic group of people. But the 'buttons' that they used to motivate the old servers just haven't worked as well with the newer servers, and the supervisors are very frustrated."

What has happened on this campus is not unique. An article in *The New York Times* describes the following recent racial and ethnic incidents on college campuses: Black students and faculty at Dartmouth and Smith colleges being harassed; swastikas and "white power" scrawled on Yale University's Afro-American Cultural Center and the city's Holocaust memorial. The National Institute Against Prejudice and Violence, based in Baltimore, says there were incidents of bias at more than 160 colleges in the last two years and that the rate of incidents appears to be increasing. Officials of the Anti-Defamation League of B'nai B'rith say more anti-Semitic incidents on college campuses were reported last year than the previous year.

Similar incidents take place off campus, as well. In early September, for example, The Justice Department opened a criminal inquiry into charges that law enforcement officers committed civil rights violations while quelling a weekend disturbance by a crowd of mostly black college students at Virginia Beach, Va.

The problems of racism seem to be more pervasive than they were in the 1970s. And the results range from blatant to subtle. For example, following several violent racial incidents, *USA Today* polled 601 blacks nationally on how racism affects their daily lives. More than 64% of those who live in central cities felt that it would be dangerous to enter parts of their community simply because of their skin color. (See chart.)

Anti-bias experts say the increase in racially motivated incidents reflects a mood of heightened anxiety among white Americans over their own economic security. Janet Caldwell, a program associate at the Center for Democratic Renewal, an Atlanta-based research group that monitors the Ku Klux Klan and other hate groups, says that tougher competition for jobs has removed the assurance shared by previous generations of white working-class teenagers that good-paying industrial jobs were theirs for the asking.

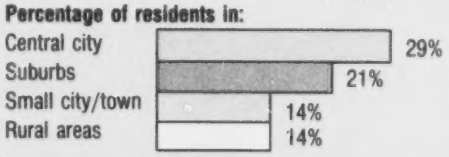
Concern on college campuses recently has been heightened as admission officers make greater efforts to increase the number of minorities on their campuses (done, in part, to meet requirements for federal grants and other monies).

Others attribute the increase to the age of many of the perpetrators. In New York City, for example, 70% of all bias incidents are now committed by people under 19, according to the New York police department. Caldwell explains, "Young people are out of touch with history. They don't have a connection to the civil rights movement and they don't have that kind of ideal."

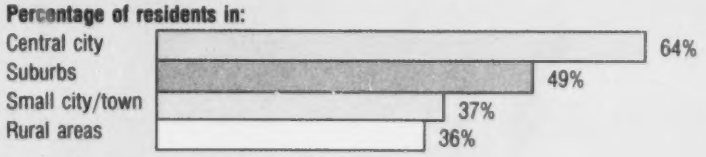
At the East Coast college mentioned at the beginning of this article, getting everyone to talk about the problem was the first step taken to ease tensions. A

BLACKS' VIEWS OF BIAS

After several violent racial incidents, *USA Today* polled 601 blacks nationally to find out how racism affects their daily lives. Following are the percentages of respondents who report racial harassment by whites, daily or frequently.



The poll's results also reported the percentage of city residents who feel it would be dangerous to enter parts of their community simply because they are black.



Source: Jeff Dionise, *USA Today*, Sept. 5, 1989.

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